

## **A Guide to the IARA/Agency Retention Schedule Update Process**

1. Agency Records Coordinator and IARA Records Analyst discuss changes to a current retention schedule. (This may be initiated by the agency, or by IARA.)
2. IARA Records Analyst sends an MS Word draft with proposed revisions to Records Coordinator.
3. Agency/division staff reviews draft, and either approves it as-is, or suggests further changes.
4. Records Coordinator either passes request for further changes to IARA Analyst (back to Step 2), or notifies Analyst that this is the final draft (on to Step 5).
5. IARA Analyst submits final draft to IARA Director/State Archivist for review.
6. If changes are requested by State Archivist, the draft goes back to Step 2. If State Archivist approves draft as-is, on to Step 7.
7. IARA analyst e-mails PDF packet to Records Coordinator which contains final draft and a cover sheet with e-signature field for the agency head to sign.
8. Records Coordinator e-mails the digitally-signed pdf back to IARA analyst.
9. IARA Analyst routes to State Board of Accounts and Historical Bureau for their review and signatures.
10. Fully signed packet is placed on the agenda for the next available monthly meeting of the Oversight Committee on Public Records (OCPR).
11. Records Coordinator is notified of meeting date/time/location and whether an agency staff member needs to attend.
12. If draft is not approved by OCPR, IARA analyst contacts agency Records Coordinator about any requested changes, and new draft is submitted to the Committee the following month. (It doesn't have to go back through steps 5 to 10.)
13. If approved by OCPR, a cleaned-up, non-draft version will be signed by IARA Director/State Archivist, then e-mailed to the Records Coordinator in PDF form. This is the new official schedule.